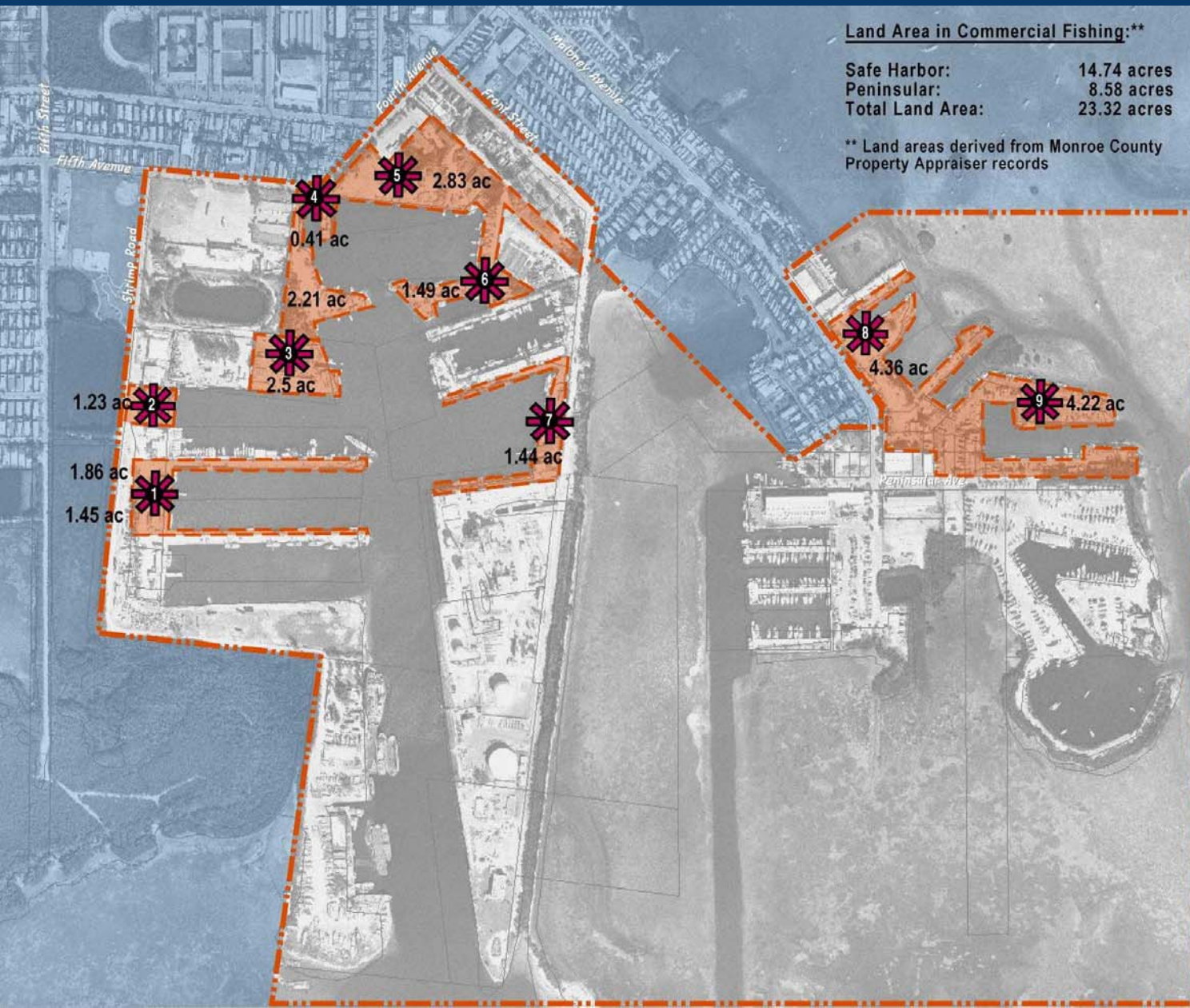

Opportunities and Constraints

1985 Commercial Fishing & Related Uses



*Locations identified in
 "A Preliminary Analysis of Commercial
 Fishing Dock Space, Monroe County,
 Florida," 1985, by Monroe County Planning
 Department

2004 Commercial Fishing & Related Uses



Legend:

- ❖ ❶ KW Seafood/Sea Market
- ❖ ❷ Fishbusterz Fisheries
- ❖ ❸ Carter Bros. Fisheries/
T&R Seafood
- ❖ ❹ Sea Lobster Co.
- ❖ ❺ Trap Storage and Work Areas
- ❖ ❻ Trap Storage and Work Areas
- ❖ ❼ Bama Seafood
- ❖ ❽ Stock Island Lobster Co.
- ❖ ❾ Gulf Seafood

Commercial Fishing Industry: Background

- **Commercial fishing has occurred in the Lower Keys for at least 200 years.** ¹
- **Until 20 years ago, it was the most important economic activity in the Lower Keys.** ¹
- **Commercial fish landings are still the “primary freight or cargo use” of Stock Island.** ²
- **Stock Island continues to rank high among leading ports nationwide for dockside value of landings (12th in 2003 with \$38.4 million).** ³

KEY WEST, FL: Landings by Year ³		
Year	Millions of Pounds	Millions of Dollars
2003	15.8	38.4
2002	17.5	43.2
2001	16.4	40
2000	16.9	50.6
1999	19.8	51.9
1998	18.9	44.8
1997	18.8	54.9
1996	23.7	62.8
1995	23.4	66.7
1994	21.5	53
1993	20.3	35.2
1992	9.4	17.4
1991	14.1	35.1
1990	11.4	21.7
1989	9.6	17.3
1988	9.2	16.8
1987	12.3	22.4
1986	15.4	27.4
1985	15.3	23.3
1984	17.7	21.8
1983	11.7	18.6
1982	10	19
1981	18	27

¹ Schittone, J. “Tourism vs. commercial: development and changing use of Key West and Stock Island,” Ocean & Coastal Management 44 (2001), 15-37

² Monroe County Comprehensive Plan Technical Document, Subsection 6.2.1

³ NOAA Fisheries Statistics & Economics Division of the National Marine Fisheries Service (NMFS)

Commercial Fishing Industry: Background

Significance to Monroe County Economy ⁴

- **2003 Lobster Landings: 3.85 million pounds in ±20,000 trips (50% of total landed value).**
- **2003 Shrimp Landings: 2.85 million pounds in 660 trips (14% of total landed value).**
- **2003 Stone Crab Landings: 964,036 pounds in 11,357 trips (13% of total landed value).**
- **2003 Fin Fish Landings: 6.1 million pounds in 16,632 trips (23% of total landed value).**

Total Local Income of Over \$100 Million Annually!

⁴ Florida Fish and Wildlife Conservation Commission: 2003 Annual Landings Summary.

Project Parameters: Opportunities & Constraints

Other Factors:

•Ownership Pattern

Legend

- Attached/Multifamily Housing
- Mobile Homes
- Commercial (Retail, Office, etc.)
- Industrial (Non-Maritime)
- Maritime Industrial
- Commercial Marina
- Commercial Fishing
- Public Utility
- Park / Open Space (private)
- Vacant / Undefined



Harbor / Port
Area

Existing Land Use Pattern

Land Use	Acreage	%
Water-dependent uses		
Maritime Commercial		
Recreational / Commercial Marina	6.00	5.1%
Mixed - Use Marina	9.95	8.5%
Maritime Industrial (boat repair yard, ship building etc.)	25.42	21.7%
Commercial Fishing (seafood wholesale/retail/processing, dockage, trap/equipment storage and manufacturing)	23.32	19.9%
Subtotal	64.69	55.2%
Non water-dependent uses		
Residential	8.13	6.9%
Commercial (retail, office, etc.)	6.39	5.5%
Non-Maritime Industrial (warehouse, manufacturing, etc.)	4.73	4.0%
Public Utility	23.83	20.3%
Park / Open Space (private)	1.84	1.6%
Subtotal	44.92	38.3%
Other		
Vacant/Undefined Use		
Private	6.98	6.0%
Public	0.65	0.6%
Total Acreage of Land Uses	117.24	100.0%

Project Parameters: Opportunities & Constraints

Other Factors:

- Setbacks
- Landscape
- Stormwater
- Parking

Legend

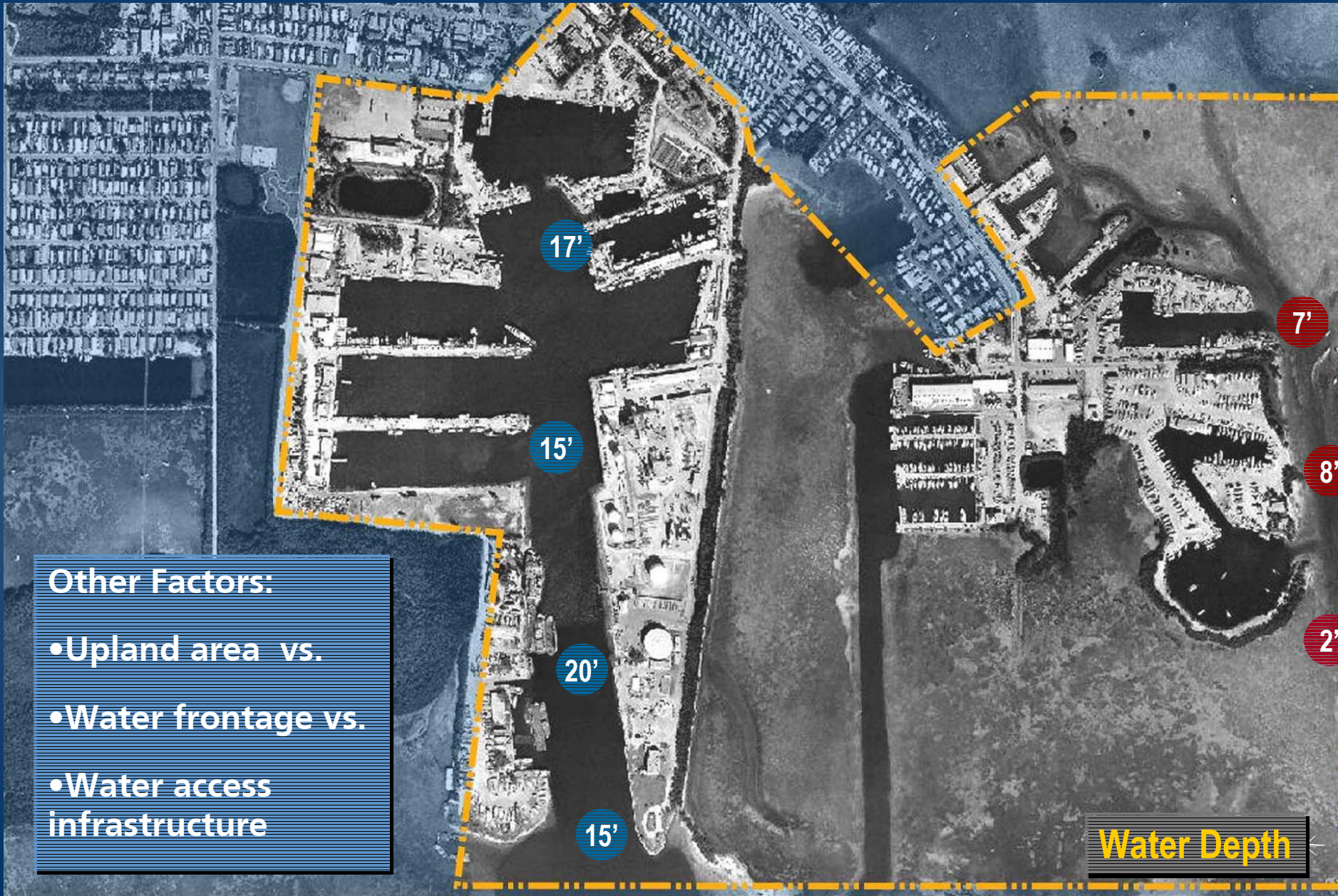
0.05 Computed Building Floor Area Ratio (FAR) or Density

- Significantly Under-Built
- Under-Built
- At Maximum Allowable FAR
- Over Maximum Allowable FAR
- Information Not Available**
- Vacant/Undeveloped

** In many cases, parcels used for outside storage or residential uses where # of units is unknown

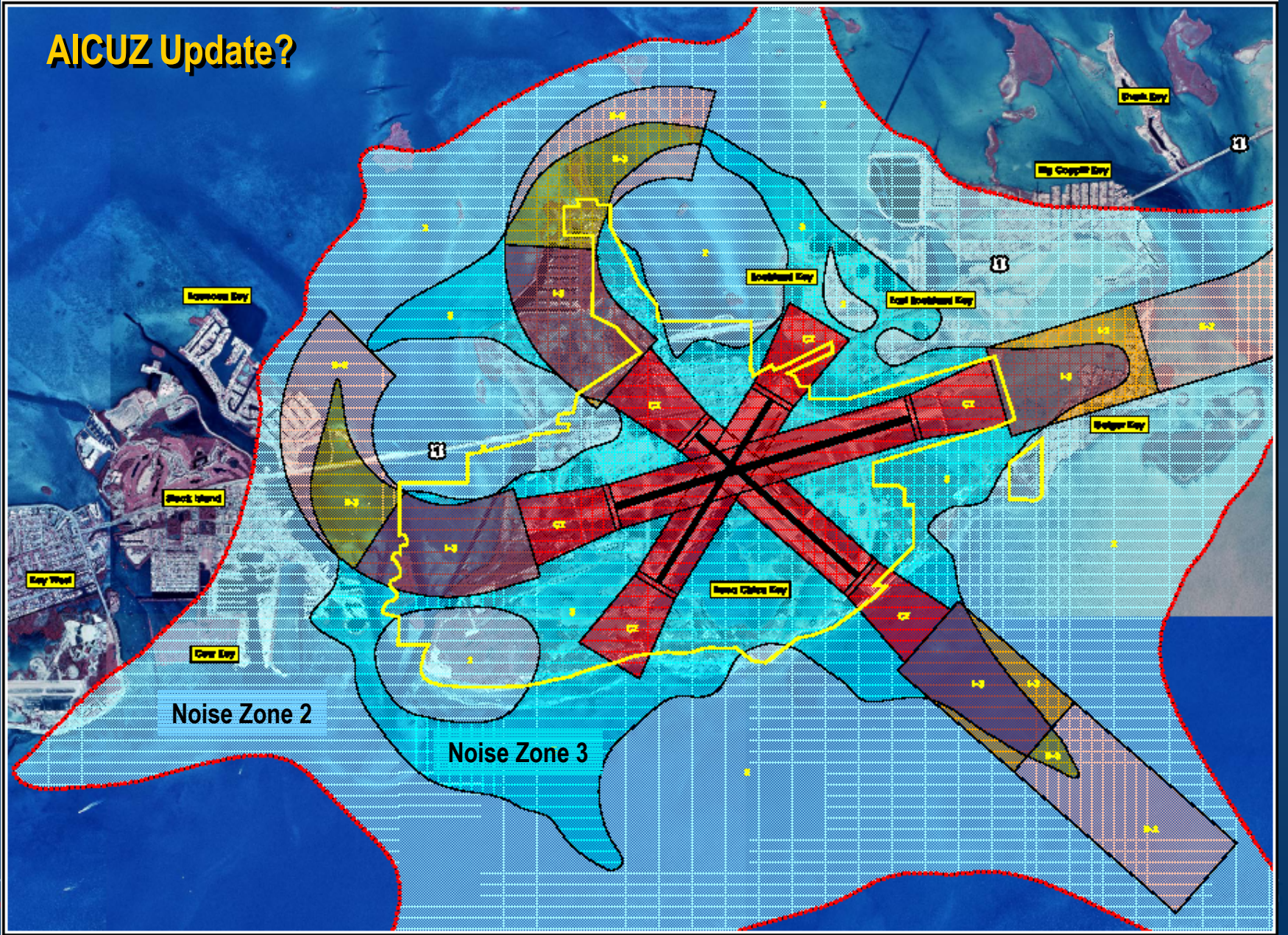


Project Parameters: Opportunities & Constraints



[illegible]

AICUZ Update?



Project Parameters: Opportunities & Constraints

Other Uncertainties...

- Tier System
- ROGO ↔ Phased Hurricane Evacuation
- Potential Environmental Issues (Site Contamination/Clean Up)
- External Constraints on Commercial Fishing Industry (Regulations, Global Competition, etc.)
- Market Pressures

